NACo Deferred Compensation State Association Profile
and Marketing Strategy Plan

(Enter Name of Association) 2022

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| **MISSION:** Add value to county employers to assist America's county employees be retirement ready.**VISION:** Provide a Section 457 deferred compensation program for county employees that is nationally recognized for the quality of the products and services including the value add of the NACo and state association endorsements and support. |
| BACKGROUND: Total Number of Counties:Participating Counties: Other Participating Entities: Number of Large/Urban Counties: Number in NACo Program: Total 457 Assets in State: Total Number of Participants:  |
| **ACQUIRE / CONSOLIDATE – Provide up to three targets with one per box.**  |
| Acquisition Target #1 | Acquisition Target #2 | Acquisition Target #3 |
|  |  |  |
| Priority Action Items: | Priority Action Items: | Priority Action Items: |
| Nationwide Relationship Owner | Nationwide Relationship Owner | Nationwide Relationship Owner |
| RETAIN – Provide up to three targets with one per box.  |
| Retention Target #1 | Retention Target #2 | Retention Target #3 |
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| Priority Action Items: | Priority Action Items: | Priority Action Items: |
| Nationwide Relationship Owner | Nationwide Relationship Owner | Nationwide Relationship Owner |

**Efficiency**

In-plan Guaranteed Options- Identify 2 counties and that are prospects for the Lifetime Income Builder “LIB” and coordinate the meetings between the county and Nationwide representatives

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| EFFICIENCY- IN Plan Guarantees |
| **Priority Counties names #** | **Date of Meetings** | **Status/Update** | **Primary Accountability** |
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eEverything

1. To Increase Participant on-line accounts, post one article per quarter on your state association website regarding on-line participant accounts and share articles with counties so that they can post as well.
2. Post the Capabilities brochure to your state association website and distribute the brochure to all counties in your state for posting on their websites.
3. Increase Plan Sponsor Payroll Automation capabilities (i.e., Fastpay) by coordinating 5 meetings between counties who do not have an automated payroll feed and Nationwide.

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| EFFICIENCY- On-line accounts and Payroll Automation |
| **4 On-line Accounts- articles** | **Posting Dates** | **Status/Update** | **Primary Accountability** |
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| **Nationwide Capabilities Brochure** | **Posting Date** | **Status/ Update** |  **Primary Accountability** |
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| **5 Priority Counties Names#** | **Date of Meetings** | **Status/Update** |  **Primary Accountability** |
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**Expand**

This list should include activities such as posting print articles and ads, provide Nationwide attendance opportunities and workshops at conferences, special communications with counties, provision of mailing lists, etc. Many of these activities are listed on earlier marketing plans.

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| EXPAND |
| **Priority Action #** | **Actions** | **Expected Benefit** | **Status/Update** | **Primary Accountability** | **Milestone Dates** |
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| OTHER OPPORTUNITIES/CHALLENGES: | LEGISLATIVE ACTIVITIES/STATUS: |